



Form ADV Part 2B – Brochure Supplement
for

Jennifer Ann Alfonso Ly
3021 E La Jolla Street
Anaheim, CA 92806

Effective: March 19, 2024

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Jennifer Ann Alfonso Ly (CRD# 4623311) in addition to the information contained in the Portfolio Medics, LLC (“Portfolio Medics” or the “Advisor”) (CRD # 145958) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the Portfolio Medics Disclosure Brochure or this Brochure Supplement, please contact us at (239) 444-1766.

Additional information about Ms. Ly is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Ms. Jennifer Ann Alfonso Ly is an Investment Advisor Representative of Portfolio Medics. Ms. Ly, born in March of 1980, is dedicated to advising Clients of Portfolio Medics and graduated in 2002 from California State Long Beach with a dual BS degree in Business/Law/Real Estate and Marketing.

Licensing and Examinations

Series 66, March 2003

Employment History:

Investment Advisor Representative, Portfolio Medics, LLC	03/2024 to Present
Agent, LifePro Asset Management	11/2018 to 08/2023
Agent, Premier Group Insurance	03/2016 to Present
Insurance/Financial Specialist and Agency Owner, Premier 360 Insurance & Financial Solutions	06/2015 to Present
Registered Representative, Transamerica Financial Advisors	12/2016 to 10/2018
Agent, World Financial Group	10/2016 to 10/2018
VP, Commercial Insurance, Excelsure Insurance Services	07/2015 to 06/2016
Unemployed	01/2015 to 06/2015
VP Manager, Citigroup Global Markets	05/2003 to 12/2014
Affluent Market Coach, Citibank	05/2007 to 12/2014

Item 3 – Disciplinary Information

Ms. Ly does not have any legal or disciplinary events that are material to a client's or prospective client's evaluation of its advisory business or the integrity of its management. Ms. Ly's FINRA Brokercheck may have additional information regarding the disciplinary history of Jennifer Ann Alfonso Ly that is not included in this brochure supplement (<http://brokercheck.finra.org>).

Item 4 – Other Business Activities

Ms. Ly has the following Outside Business Activities. She is an agent for Premier Group Insurance where she transacts in insurance related products. She spends approximately 40 hours a month during market and non-market hours in this activity. She is also an owner, insurance/financial specialist for Premier 360 Insurance and Financial Solutions. She spends approximately 40 hours a month during market and non-market hours in this exercise.

Item 5 – Additional Compensation

Ms. Ly does not receive additional compensation other from any other outside business activity.

Item 6 – Supervision

Ms. Ly serves as an Investment Advisor Representative of Portfolio Medics and is supervised by John Billy, the Chief Compliance Officer. John Billy can be reached at (239) 444-1766.

Portfolio Medics has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to Clients of Portfolio Medics. Further, Portfolio Medics is subject to regulatory oversight by various agencies. These agencies require registration by Portfolio Medics and its employees. As a registered entity, Portfolio Medics is subject to examinations by regulators, which may be announced or unannounced. Portfolio Medics is required to periodically update the information

provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

Item 7 – Requirements for State Registered Advisors

Ms. Ly does not have any additional information to disclose.